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ABSTRACT

In response to a 1987 survey that indicated that continuing education was the most pressing need of the Idaho library community, the Idaho State Library convened a task force that worked with a consulting librarians' group to prepare a 3-year continuing education plan for individuals involved with all types of libraries. Indicators at that time led to a separate study of trustee continuing education, and the State Library contracted a consultant to work with staff to create a supplemental element for future revisions of the 3-year plan specifically focused on the education and organization of public library trustees. Focus groups were held for trustees. From this study, the following goals were derived, to be included in a revised 3-year continuing education plan beginning in 1992-1994: (1) trustee information needs are assessed on a regular basis; (2) trustees have personal contact with other trustees, librarians, and State Library representatives on a regular basis; and (3) continuing library education opportunities are made available to trustees according to their prioritized needs for content, method of delivery, and geographic accessibility. Objectives to be met in pursuit of these goals are outlined. An appendix contains supplemental material including focus group attendees, cover letters and information sent to them, and lists of topics for discussion. (SLD)

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Idaho Public Library Trustee Continuing Education Plan

1991-1993

prepared by
Gail McGovern

for the
Idaho State Library

November 1990

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I would to like to thank staff members of the Idaho State Library for their efficiency and hospitality while I was conducting the survey.

Having a friendly face waiting at the airport, being delivered directly to hotels and libraries and sharing friendly conversations is such a special pleasure when working away from home; my thanks to Karen Strege, Glenda Anderson and Gardner Hanks for really making me feel welcome.

I especially appreciated working with Gardner Hanks and meeting his family.

All of the trustees and library staff I met with or talked to on the telephone gave graciously their time and feelings. Idaho residents are lucky to have such caring people involved in library service.

Idaho Public Library Trustee Continuing Education Plan 1991-1993

Purpose of Plan:
The Idaho State Library feels that public library development in Idaho is dependent on a strong group of dedicated and knowledgeable trustees.

In response to a 1987 Statewide Strategy Survey that indicated continuing education was the most pressing need for the Idaho library community, the Idaho State Library convened a Continuing Education Task Force. This task force worked with the Consulting Librarians Group in the preparation of a three year statewide continuing education plan for individuals involved with all types of libraries. Implementation of the three year plan began in 1989.

Annual evaluations and revisions of the three year plan are the responsibility of Gardner Hanks, Idaho State Library Continuing Education Consultant.

Indicators that led to a separate study of trustee continuing education were: 1) low numbers of trustees participating in continuing education activities sponsored by the Idaho State Library over the past three years and 2) low level of participation of the Trustee Division within the Idaho Library Association.

The Idaho State Library contracted with Gail McGovern to work with its staff to create a supplemental element for future revisions of the three year plan specifically focussed on the education and organization of public library trustees.

Process Overview:
The Idaho State Library wanted an approach which reflected the needs and priorities of Idaho public library trustees. The methodology selected was conducting focus groups of trustees in three locations (Coeur d'Alene, Blackfoot and Boise) and telephone interviews both with trustees unable to attend the focus groups and key librarians.

Gail McGovern worked with Idaho State Library staff to select a representative sample of trustees and librarians. Factors taken into account in choosing the sample were: geographic representation, size of library, size and type of community, level of participation in trustee activities outside local the library area, involvement in Idaho Library Association and/or American Library Association activities.

Specific questions the Idaho State Library wanted answered by the trustee study are listed below:

1. What should the Idaho State Library do to increase attendance at its continuing education activities for public library trustees?

2. Should the Idaho State Library pursue alternatives to the all-day workshop (e.g. evening meetings, video based education) as a means of delivering education to public library trustees?

3. What subject matter is most important to trustees? Does this vary in different parts of the state?

4. Are any kind of presenters more attractive to trustees than others? For example, would trustees prefer to have out-of-state presenters over in-state presenters?

5. How can the Idaho Library Association better serve trustees?

6. What should the Idaho Library Association do to increase trustee attendance at it Conference and spring mini-conferences?

Time frames for the public library trustee plan follow:

September 1990	Preparation and organization for the project
October 10-14, 1990	Site visits and telephone interviews
November 15, 1990	Draft plan due to Idaho State Library
November 30, 1990	Final plan due to Idaho State Library

Overview of Focus Groups and Telephone Interviews (see appendix A for a list of those interviewed and a detailed list of responses):
Trustees selected to participate in focus groups were telephoned by Idaho State Library staff, then sent a confirming letter, list of expected participants at their focus group session and a session agenda (see appendix A for a copy of the three items). Those trustees unable to attend a focus group were asked to participate in telephone interviews.

To make participants of the focus groups as comfortable as possible in sharing their concerns, Gail McGovern conducted the sessions without any Idaho State Library staff present. The two hour long sessions were held in meeting rooms at the Coeur d'Alene Public Library, Lucy Boyle Public Library (Blackfoot), and Idaho State Library (Boise). Refreshments were served at all three locations. Participants were asked to complete an evaluation form about the session (see appendix A for a copy of the evaluation form).

Trustees interviewed by telephone were asked the same questions as those who attended the focus group sessions. Librarians interviewed by telephone were asked what assistance they felt would be helpful to trustees in carrying out their roles and responsibilities, barriers they thought trustees had encountered in performing their roles and responsibilities and specific continuing education activities the Idaho State Library and Idaho Library Association could carry out to assist trustees in carrying out their roles and responsibilities.

When asked how they perceive the public library, the majority of those trustees who attended focus group sessions or were interviewed by telephone, said they see the library as a place for people to read and relax. The next most popular response was that of an information source for the community, including support for school curriculum, vocational needs, literacy tutoring.

The most commonly given reasons the trustees interviewed gave for getting involved with the library were: 1) they had a love of reading throughout their lives 2) they wanted their children to benefit from library services 3) they were recruited by public officials or library staff and 4) they wanted to fight censorship.

Trustees see their roles and responsibilities centering on representing taxpayers. Internally, they see themselves as a sounding board and as support for the library director. Externally, they see themselves as advocates for the library in the community and as the channel for the community to make itself heard to the library.

The most frequently mentioned topical areas about which trustees would like assistance and/or have encountered barriers in the past were: general guidelines for functioning effectively as a trustee with emphasis on budgeting and fiscal liability, recruiting new trustees, hiring and firing a library director, running a meeting effectively and how to do fundraising.

The most frequently mentioned activities were: short presentations made at already scheduled board meetings, videotapes which could be viewed as a board or individually, simplified fact sheets on specific topics, regional workshops on specific topics, regular mailings to trustees on specific topics focussing on the trustee point of view and an annual calendar of trustee activities.

No matter what the activities, trustees expressed the need for acknowledgement of their concerns and opportunities to share feelings with other trustees. Trustees also expressed a need for more information about the types of assistance available from Idaho State Library staff; they want more interaction with the State Library.

Using specific data gathered from trustees and librarians along with reading between the lines, the answers to the six questions proposed by the Idaho State Library are noted below. This information is then translated into a set of goals and objectives for 1991-1993.

1. To encourage trustee participation in continuing education activities, the Idaho State Library should find ways to make more personal contacts with trustees. This encouragement should be treated as a target group outreach effort and should make use of the mail, the telephone and in person meetings.

2. The Idaho State Library should pursue a variety of alternatives to the all-day workshop. Visits by State Library staff to individual and/or small geographic clusters of library trustees would be the most effective. Videotapes with workbooks on key topics would be of great value. A newsletter containing information of specific interest to trustees and a continuing education calendar would be very useful and reinforce the other methods.

3. Trustees are most interested in 1) a general overview of what being an effective trustee means with emphasis on budgeting and fiscal responsibility, 2) trustee and library staff relations and 3) running effective board meetings. There is some variety in different parts of the state, but these topics are the highest priorities of all.

4. Trustees want to hear quality presenters who are entertaining as well as informative. The question of out-of-state being more or less desirable than in-state is of negligible concern to most trustees. They would like to hear from other trustees as well as experts in particular subject areas.

5. To make an impact on trustees, the Idaho Library Association needs to make more personal contact with trustees on the local level. Sending a representative of the Idaho Library Association to attend selected board meetings or attend continuing education events sponsored by the Idaho State Library would dramatically increase visibility. The representative could be the president, a person who does membership promotion, etc.; a trustee member would be the most effective. Mailing information about the benefits of membership in the Idaho Library Association would reinforce personal contact. Special membership discounts for trustees to join the Idaho Library Association would also attract new trustee members.

6. Attendance at the Idaho Library Association Conference and spring mini-conferences will increase if trustees in the closest geographic proximity to the conference sites are personally contacted and invited. Having a representative visit selected board meetings and discuss the specific benefits of attendance would make the greatest impact. Telephone contact to the chairpersons of boards would also stimulate interest. Scholarships to attend the conferences would also increase attendance.

The following goals and objectives should become a part of the revised three-year continuing education plans beginning with 1992-1994.

Goals:

Goal A: Trustee information needs are assessed on a regular basis.

Goal B: Trustees have personal contact with other trustees, librarians and State Library representatives on a regular basis.

Goal C: Continuing library education opportunities are made available to trustees according to their prioritized needs in regard to content, methods of delivery and geographic accessibility.

Objectives arranged by goal:

Goal A: Trustee information needs are assessed on a regular basis.

Objective A1: By March 29, 1990, the Idaho State Library will have established an advisory board of 7-9 trustees. This board will meet at least annually with the Idaho State Library trustee liaison and the Idaho State Library continuing education consultant. The makeup of the board will include new and experienced trustees, geographic distribution, size of library, size and type of community and type of library board. This board would provide a method of assuring regularized input for planning, implementation and evaluation of both statewide and local activities designed to reach trustees. In addition, this board should gather data and make a recommendation on the feasibility of establishing area networks or organizations of trustees in the future.

Trustees expressed a need to be a part of any process designed for them. Even though there was trustee input into the statewide continuing education plan, it was a small percentage. As evidenced by comments of trustees interviewed for this plan, trustees statewide do **not** have a high awareness of the services of either the Idaho State Library or the Idaho Library Association. Some trustees expressed a desire to be involved in area organizations of trustees and librarians.

Objective A2: By April 30, 1991, the Idaho State Library will have mailed a written questionnaire to chairpersons of all boards of trustees to assess information needs of individual board members.

The questionnaire will provide a snapshot of trustee needs. Snapshots need to occur regularly (see objective A4); however, a written questionnaire may not always be the best method. The questionnaire method is recommended at this time to serve both as a data gathering vehicle and as a fast, inexpensive and very visible outreach

approach by the Idaho State Library to all trustees. The advisory board (see objective A1) should be involved in the development of the questionnaire.

Objective A3: By June 28, 1991, the Idaho State Library will have conducted 25 telephone interviews with new trustees to assess their information needs. The trustees chosen should be based on geographic distribution, size of library, size and type of community and type of library board.

The emphasis on new trustees is to gather data to assist in planning for objective C1. Trustees interviewed for this plan all felt they would have benefited most from orientation sessions at the beginning of their first term. This is also an excellent time in a trustee's career to instill an awareness of 1) the Idaho State Library's concern for trustee welfare and 2) the assistance available from the Idaho State Library and the Idaho Library Association.

Objective A4: By September 28, 1991, the Idaho State Library will design a process to assess trustee information needs on an biennial basis beginning in January 1992. This process should be incorporated into revised three-year continuing education plans beginning with 1992-1994. This process should include a scheduling component for Idaho State Library area consultant visits to each board of trustees based on individual workplans and geographic parameters.

Trustee turnover and local situations make it necessary to take snapshots of current needs. With limited resources stretched to provide assistance and survey needs, a two year assessment seems the most reasonable.

Goal B: Trustees have personal contact with other trustees, librarians and State Library representatives on a regular basis.

Objective B1: By December 31, 1991, the Idaho State Library will have conducted six two hour evening trustee "town meetings." Both trustees and librarians from each geographic area will be invited to the meetings, but the focus will be on trustee issues.

The meetings will include time for trustees to become acquainted and share mutual concerns as well as include a presentation on a topic of local interest. Meeting dates, locations and content should be determined using the results of the written questionnaire (see objective A2) and telephone interviews (see objective A3).

Appropriate Idaho State Library staff should attend the meetings (it would be preferable to have all of the following present at each session: the State Librarian, field consultants, trustee consultant and continuing education consultant). These would also be good meetings for a representative of the Idaho Library Association to attend. Local boards could serve as co-hosts with the Idaho State Library and invite those in their area.

Evaluation forms should be given to attendees of these "town meetings" to see how effective the meetings were and what other types of events they would find most useful in the near future.

Objective B2: By September 28, 1991, the Idaho State Library will have developed a process for producing and distributing an annual trustee directory. The directory will contain the name, address and phone number of the chairperson of each board of trustees; the directory will allow trustees to contact each other directly.

Trustees expressed the need to talk with other trustees. Having a printed directory would give them a way to easily contact each other; it is also another means of showing that the Idaho State Library puts annual emphasis on working with trustees. It may be feasible to include this information as a part of the existing annual library directory published by the Idaho State Library and distribute that directory to all trustees.

Goal C: Continuing library education opportunities are made available to trustees according to their prioritized needs in regard to content, methods of delivery and geographic accessibility.

Objective C1: By September 28, 1991, the Idaho State Library will have developed a process for prioritizing onsite, telephone and written contacts made by staff focussing on the orientation of new trustees. The Idaho State Library should work towards the goal of personally contacting each new trustee during the first three months of his/her term.

Trustees want to know that they are functioning effectively. A pivotal time to show that the Idaho State Library 1) cares about how trustees function and 2) wants them to be aware of assistance available to individuals and boards is when they are new.

The Idaho State Library should have a process for identifying new trustees and contacting them to reinforce the awareness of Idaho State Library services. For example, a sizable number of trustees who attended the focus groups were not familiar with "A Guide for Trustees of Idaho Public Libraries."

Objective C2: By January 31, 1991, the Idaho State Library will have created a regular section in the Idaho State Library Newsletter dedicated to trustees.

Both trustees and librarians mentioned having had difficulty identifying those items from the Idaho State Library newsletter which are of particular interest to trustees. Highlighting a section specifically for trustees will make it clear which issues the Idaho State Library wants to emphasize.

Objective C3: By November 30, 1991, the Idaho State Library will have developed and distributed to all trustees a trustee newsletter including information on assistance and services available from the Idaho State Library and the Idaho Library Association, a calendar listing trustee continuing education activities and Idaho Library Association conferences scheduled from January 1992-December 1993.

Trustees expressed a need for a newsletter specifically designed for them with information presented "from the trustee's point of view." Trustees also expressed a need to plan at least on an annual basis for attendance at continuing education events. The newsletter should be at least quarterly to all trustees.

Objective C4: By September 28, 1991, the Idaho State Library should schedule three one day workshops on topics identified as highest priority statewide to be held January 1992-December 1993.

The topics of current statewide concern, which also should be offered regularly on a biennial basis, are: 1) general guidelines for being an effective trustee, 2) trustee and library staff relationships and 3) running effective board meetings.

There is too much material to be covered on these topics to offer them in a smaller time block than one day; they should be made available on videotape for those unable to attend the sessions (see objective C6).

Holding sessions in six locations seems to work well for allowing reasonable geographic accessibility for statewide continuing education events. Library staff should be encouraged to attend with their trustees whenever possible.

Objective C5: By September 28, 1991, the Idaho State Library in consultation with the Idaho Library Association and area library networks will have developed a priority list of topics for trustee continuing education activities to be scheduled from January 1992-December 1993 (in addition to those offered regularly as noted in objective C4).

The Idaho State Library should identify and prioritize these topics as a result of the questionnaire (see objective A2) and discussions with the advisory board (see objective A1), Idaho Library Association and area library networks.

Scheduling too many continuing education activities at busy times can significantly hinder attendance. Questions to look at in regard to planning trustee continuing education activities to be scheduled from January 1992-December 1993 are:

1. What specific results is the Idaho State Library expecting from sponsoring a particular activity? (i.e.what impact will be made on the ability of trustees to perform their roles and responsibilities as a result of, how many attendees makes it feasible to sponsor a particular activity)

2. How should existing continuing education activities such as the Idaho Library Association mini-conferences relate to biennial offerings planned by the Idaho State Library? Should they be held in conjunction with other activities, as pre or post sessions or completely separate? Why is it important to sponsor a particular activity at a particular time?

3. What type of pilot projects can be developed by the Idaho State Library in cooperation with the Idaho Library Association and area library networks to test what works best in reaching trustees (taking into account content, methods of delivery and geographic accessibility)?

4. How can the Idaho Library Association use its limited resources to increase its emphasis on trustees (e.g. a "trustee track" at conferences, discount pricing for trustees)?

5. How can ideas and resources from nearby states with active trustee programs (Nevada, Washington, California) and/or the American Library Association be used in Idaho?

6. What evaluation measures will be used to see if goals have been met?

Objective C6: By December 31, 1993, the Idaho State Library will have developed three information kits for trustees on 1) general guidelines for being an effective trustee, 2) trustee and library staff relationships and 3) running effective board meetings. The kits will include a 20-30 minute videotape and multiple copies of a coordinated printed workbook.

At least 25 copies of each kit should be made available for loan and permission given for duplicating the video. At the same time the calendar (see objective C3) is distributed, promotional information on the kits should be included. Each time a kit is loaned an evaluation form should be included. When trustee needs are assessed in the future (see objective A3) questions on the value of the kits should be included.

Objective C7: By December 31, 1991, the Idaho State Library will have spearheaded the development of written guidelines for local libraries about their responsibilities in providing trustee continuing education.

Librarians interviewed talked about their role in assisting trustees at new trustee orientation sessions or board meetings. These efforts vary greatly from library to library. It would help both library staff and trustees to have written guidelines for libraries. These guidelines should include policies on types of information, methods for providing information, funding for travel to regional, state and national events, etc.

A task force should be appointed by the Idaho State Library to develop the guidelines. This task force should include representatives from the advisory board, trustee division of the Idaho Library Association and librarians from different sizes and types of libraries who have experience in providing effective continuing education opportunities for trustees.

Coeur d'Alene Focus Group

Attendee List

Arlene Norwood	Boundary County Library District
Ellie Gimmestad	Clearwater County Library District
Fay Sweeney	Coeur d'Alene Public Library
Ed Joy	Consolidated Free Library District
Florence Carter	East Bonner County District Library
Doris Head	East Bonner County District Library
John Pool	Moscow-Latah County Library
Karol Hoisington	Nez Perce County Library District
Bonnie England	Osburn Public Library
Gloria Johnson	Osburn Public Library
Bob McClure	Post Falls Public Library
Sandy Bogen	Priest River Public Library
Shirley Murray	Priest River Public Library
Merna Park	St. Maries Public Library
Katherine McFadden	St. Maries Public Library

Group Responses

1. Perceptions attendees have of library services:

best source of information for all people, all ages
place to read and relax
most economical source of recreation and information
vocational/job information source
variety of services besides books (e.g. videos, stereo)
warmest, most comfortable place
people's university
source of community pride, life, center
people identify with the library
community builds on and supports the library
prime source of local and regional history
community pride can cause dissension
tug of war re funding, budget cutting
only source of learning, educational outreach in geographic area
extension to inadequate schools
expand/extend collection through interlibrary cooperation
programs (Let's Talk About It) reach people not otherwise served
satisfaction level high, large circulation
friendly nice place to come for recreational reading and socializing
non threatening, accept all people, don't need to put on airs

summer reading program filled gap, children learn about library
lots of people never set foot in a library, how do we attract them
use of typewriters, computers, copiers, fax
directions on how to find all kinds of things
literacy training
image to overcome, work through children
great library staff
need people to know what the library can do for them
libraries have too low a profile
trustees could blow the horn louder
more problematic when community is larger, more choices
people think all a librarian does is check out books
we need to educate people about taxes
we need to show people they get what they pay for from the library

2. Reasons/values attendees have for being trustees

I've always been interested in libraries; I was told I'd make a good librarian; I wanted to give something back to the community

I retired from teaching due to health; I wanted to stay close to people and books; I have grantwriting skills; I'm addicted now

I've been a patron since knee high and also a school librarian; I wanted to keep involved with the library

I was administrative assistant to the mayor when I retired; four people approached me to serve; I had worked on library affairs in my city job and I enjoyed it; I wanted to upgrade the library

My friend, a library staff member, asked me to get involved; I enjoy the interchange with other highly intelligent individuals; we have differing views, but they're a great group of people

The library gets overlooked for funding; it can seem less essential; I wanted to make sure the library got its fair share

I filled a vacancy, initially as a "warm body;" if I left now I am concerned what would happen; I feel obligated

I had recently retired from a government job; I wanted to get involved; my mother had instilled a love of reading

I wanted my children involved in the library; I was there so often, they asked me to serve; I'm addicted now

I've always been a library user and lover; I had been on a League of Women Voters committee when the library had a negative reputation; I wanted to turn it around; it is rewarding

I was asked to fill in for someone who was ill, I finished the term

I heard some people say the library wasn't needed because the only way to learn is from parents; I worked to change that opinion

In every step of my life librarians had great influence on me

3. How attendees would define their roles and responsibilities as trustees

fiscal obligation to people of county; educational obligation to library patrons and potential users; obligation to taxpayers, representatives
hire, supervise, support the talented people working in the library
provide best service to community with existing resources
interpret role of library to the public
upgrade service for public and staff
advocates for the library; two way street -- what it is/what it could be
meet or exceed professional standards; plan for future of library
staff doesn't have time to plan; trustees can look beyond; with different backgrounds, bring a broad base to planning
recommend right people to replace trustees; advise the city
working conditions for the staff
consider what's best for the library and staff; staff too close to see perspective
sounding board for library director's ideas
knowledge about library law

4. Assistance attendees would like in carrying out their roles and responsibilities

money and time
workshops
orientation for new trustees
library laws
understanding acronyms
publications
more meetings for local Board members (now quarterly)
how to run a meeting
evaluation of what being a trustee is; how long should a trustee stay
understanding of open meeting law; ramifications of that law
what you have to do and not do
staff/trustees relationships
encourage trustee communication among different libraries/networking
new technology (e.g. how to computerize)
publicity/ p.r. -- how to do it
fundraising; how to set up endowments without jeopardizing city funds
grantwriting
how to interpret audit reports; questions to ask about financial statements
simplified information about cash flow, reserves, etc.
how to implement outreach program ideas
how to determine community needs (design new services, etc.)
how to organize a trustee notebook, handle paper, what to keep
how to hire a librarian, set salary, reevaluate
what's available from the State Library

5. Barriers encountered in performing their roles and responsibilities

building a new building
previous trustees didn't do a good job; how to change status quo bad things
how to do valid questionnaires to survey the community
how to deal with budget planning for the year
how to set goals for the future
how to reach goals, whose responsibility -- staff vs. Board
defining the library's mission
how to share responsibility -- everyone not contributing equally
how to deal with amount of influence some Board members have due to time they have available
how to identity and utilize Board member skills and abilities
how to work in groups
how to deal with mandated policies by the State Library

6. Specific continuing education activities

workshops (small, centrally located, good leadership vs. roundtable discussion with same people, hear experts not facilitating consultant, tell us what works)
videotapes by experts with 1-2 hours of hard info, copies for all libraries (not just for loan) with workbooks, want quality, standards have not been high enough
computer bulletin board system for topical information
800 phone number for all State Library contact people
pamphlet on State Library services or regular insert in State Library newsletter
workshops target to new vs. experienced Board members
videoconferencing
more p.r. about what exists
trustee directory
information on ILA trustee division
ILA should offer more for secondary level school librarians
travel funds for c.e. events
hold events more than 3 locations; no more than two hour drive
survey Boards on specifics (location, time of day, topic, etc.)
WILL workshop
speakers like Attorney General from Montana on law

Blackfoot Focus Group

Attendee List

Jane Infanger	Bonneville County Library District
Ida Hardcastle	Idaho Falls Public Library
Jayne Niederer	Jefferson County District Library
Alice Cannon	Lucy Boyle Public Library (Blackfoot)
Brent Ashcraft	Madison County District Library
Viva Burrie	Oneida County District Library
Larry Farrell	Pocatello Public Library
Elmer Oliverson	Preston Public Library
Jan Walker	Rigby Public Library
Albert Kimmel	Ririe Public Library
Bruce Crockett	Shelley Public Library
Kaye Romriell	South Bannock District Library
Paul Lish	South Bannock District Library

Group Responses

1. Perceptions attendees have of library services:

focus, center of additional low cost education means to meet needs
supplement to school
resource for information
educational needs
recreational needs, pleasure
for all ages
social place
entertainment (e.g. videos)
not a source of deep technical research for serious scholars
does meet needs of serious researchers, interlibrary loan service

2. Reasons/values attendees have for being trustees

I was appointed by the mayor because I'm a library user and homemaker, it was like a job interview; I had to make a time commitment
I got a phone call from mayor, had experience in school bond issues
I had budget experience
I was a library user; there was a hold on my library card; they asked me to be on the Board since they were advertising an opening
Board members approached me with a petition
I have a sense of involvement and responsibility to see through the programs
I represent a "type" of citizen
It is easy to serve with a good library director

3. How attendees would define their roles and responsibilities as trustees

policy maker
design budget
hire and fire the library director and staff
personnel
fundraising
building
mover and shaker
no "micro" managing; let the library director manage
p.r.
support for the library director
support for decisions e.g. censorship
make community aware of continuing education opportunities

4. Assistance attendees would like in carrying out their roles and responsibilities

designing a new building; how to work with an architect
ways/methods of forming a library district
how to communicate directly to the State Library vs. area communication
how to adapt to changes after loss of regional contact
how to again feel a part of a system/support
how to get to know more trustees
how to have more local control
definition of role of State Library area consultant
channels for getting help
subsidy to attend ILA
how to fire a director, step by step
simple interpretation of legal liabilities (for what could we be sued or not)
financial assistance; how to get grants

5. Barriers encountered in performing their roles and responsibilities

how to find a director (criteria, where to advertise)
setting up policies and procedures
"things" (e.g. meetings, publications) done from a trustee point of view
how to run/organize meetings and decision making processes
new trustee orientation
more visibility for events/services directly to trustees

6. Specific continuing education activities

panel discussion (e.g. job descriptions)
annual session for new trustees done by State Library
regional activities
segment issues in shorter time periods for c.e. events
vary scheduling so not always weekdays (weekends and evenings)
have events no more than two hour drive away

videotapes on a variety of topics which can be shown at Board meetings: tapes of sessions done in State, 20-30 minute presentations on issues with accompanying handouts, individualized learning packages
survey trustees for specific information on needs
checklists on a variety of topics
personal contact with new trustees within first three months
monthly mailing to trustees on specific issues of concern to trustees
make mailings and presentations using more trustee-ese no library jargon
reorganize regions (regional boards,monthly meetings for librarians, quarterly meetings/workshops for trustees)
job description of area representative
ask librarians if regional organization meets their needs
annual calendar of c.e. events published early
coordinate semi-formal exchanges of Board members
at annual meetings have local trustees as presenters not just State Library staff

Boise Focus Group

Attendee List

Judy Gillespie	Ada County District Library
Lynda Kuwahara	Boise Basin District Library
Martha Noffsinger	Boise Public Library
Wauneta Ellington	Bruneau District Library
Muriel Moss	Buhl Public Library
Kermit Tate	Eastern Owyhee District Library
Dorothy Lewis	Filer Public Library
Ed Rinker	Garden City Public Library
Cora Caldwell	Gooding Public Library
Stefanie Marvel	Hailey Public Library
Von Comstock	Nampa Public Library
Dennis Vorhees	Twin Falls Public Library
Barbara Barber	Weiser Public Library

Group Responses

1. Perceptions attendees have of library services:

puts on plays
place for high school students to study (staff paid by school 3 days/week)
alternative school
information source
story hour
average age patrons is 13; children's services are important
small, rural, general collection, emphasis on students
small, rural, teacher brings students in every two weeks
librarian from school for the deaf, resource sharing - public library/other schools
programs for disadvantaged, Laubach facilities
new branch in shopping mall, attracts new people
magazines on CD ROM
independent learner resource center (business, history, science, journalism)
meeting place (vocal group, language classes)
large amount administrative detail needed to provide services
social center, reading corner for kids so adults can talk to other adults
meeting room used regularly by community organizations
support GED test studies
plan to have satellite dish to make Boise State classes available
transients can be a problem
literacy programs

latch key children

2. Reasons/values attendees have for being trustees

I wanted to help pay the rent i.e. give something back to my community
I wanted to work on the new building program
I was a good library user and was asked to get involved
I was threatened into it because I checked out so many books
my daughter went to story hours; I had a background in computers so they asked me to get involved
I was a library user and got more interested in making a difference; I was angry at how the city treated the library and wanted to make changes
I love books, learning, reading; as a parent wanted to have material for children
political ambition
first a library user, then became interested in many libraries
fear of censorship
library is critical in my community; I want to see it continue its success

3. How attendees would define their roles and responsibilities as trustees

carrying out state statutes
boundary spanner - bring in energy and money from community; help library administration look out into community
internal and external; listener, advocate, bring back messages, take library view outside, act as p.r. person
beginning Board worker bees-surveyed community; now focus on finance and technology
sounding board and support for library director and library programs
group c.e.o. - hire librarian to run the place, make it possible for staff to do job, replace if not doing a good job
represent taxpayers
negotiators with bordering library districts; contracts to serve others
rainmakers - keep $$ flowing
futurists with enthusiasm
set and approve policy
highly political, maintain relationship with city council
bulwarks - protection to let library administration be creative and take risks
city council members liaison
awareness

4. Assistance attendees would like in carrying out their roles and responsibilities

how to choose a trustee, recruit new ones
trustee orientation (onsite about specific library and users)
presentation on fiscal topics (where $$ come from, how ratios determined, etc.)
budgeting
how library fits in with network, other libraries in area, other resources, state system, State Library Board
mini-orientation for Board candidates
history of the library, guidelines, budget packet
presentations on specific issues at Board meetings

5. Barriers encountered in performing their roles and responsibilities

information on parliamentary procedures
presentation on trustee guidelines by State Library
information on business management (e.g. hiring staff)
clearer definition of State's responsibility vs. city responsibility
orient trustees early on role of library in our culture
role of our library in our community

6. Specific continuing education activities

subsidies to attend meetings (transportation for regional; transportation, lodging and meals for state)
quality products
videotapes
audiotapes
cluster meetings
topics for specific libraries
State Library staff visit to meet with individuals and/or groups
teleconferencing (video or slides; phone hookup, speaker at remote location who presents to all sites)
audioconferencing
presentations at existing Board meetings (30 minutes)
annual plan for trustee education
Board input into the content of c.e. activities
small groups meeting with other libraries of the same size and geographic area
meetings with State Library area representative and whole Board
vary scheduling of multiple meetings (too many, too close together or too spread out)
grant to attend ALA conferences
personal contact/support strategy to motivate trustees
exchange of successful practices in State Library newsletter
direction from the State Library about long range planning
set up a model library trustees could visit
ways to standardize operations (e.g. automation)

Sample letter used for Boise focus group
mailed on Idaho State Library letterhead

September 26, 1990

Trustee Name
Address

Dear Trustee Name

I want to thank you for agreeing to come to the meeting for library trustees in your area. The meeting will be held at the Idaho State Library, 325 West State Street in Boise, on Saturday, October 13th. The meeting will start at 10 a.m. and will last approximately two hours. Since the State Library is closed on Saturday, you will need to use the door in the back of the building on 3rd Street. The State Library will reimburse you for your mileage.

Gail McGovern, who is a library consultant from California, will be leading the meeting. It is our hope that after meeting with you and other trustees, Ms. McGovern will be able to write an effective plan for delivering better continuing education for all of Idaho's public library trustees. The State Library feels that having well educated library trustees is absolutely vital for public library development in Idaho.

I am enclosing Ms. McGovern's agenda for the meeting, so you will know what to expect. I am also including a list of trustees who have tentatively agreed to attend.

If you have any questions, or if for some reason, you will be unable to attend the meeting, please call me at (800) 458 3271 or 334-2153.

Sincerely,

Gardner C. Hanks
Continuing Education Consultant

BOISE AREA TRUSTEES MEETING

Judy Gillespie	Ada County	375-6229
Lyn Kuwahara	Boise Basin	392-6679
Martha Noffsinger	Boise	334-3475
Waunita Ellington	Bruneau District	845-2062
Ed Rinker	Garden City	853-2550
Kermit Tate	Eastern Owyhee	834-2260
Von Comstock	Nampa	466-3643
Barbara Barber	Weiser	549-3758
Muriel Moss	Buhl	543-6237
Cora Caldwell	Gooding	934-4457
Stephanie Marvel	Hailey	788-2988
Dennis Voorhees	Twin Falls	734-1516

Purpose of the focus group meetings:

To give participants a chance to give their own views and to brainstorm how the Idaho State Library, the Idaho Library Association, local library staff and trustees can work together to meet the information needs of Idaho library trustees.

Focus Group Agenda (2 hours)

Welcome and introductions (10 min.)

Overview of meeting objectives and process (10 min.)

Discussion of perceptions attendees have of library services (10 min.)

Discussion of reasons/values attendees have for being trustees (15 min.)

Discussion of how attendees would define their roles and responsibilities as trustees (15 min.)

Discussion of what assistance attendees would like in carrying out their roles and responsibilities as trustees (15 min.)

Discussion of barriers attendees have encountered in performing their roles and responsibilities as trustees (15 min.)

Brainstorm specific continuing education activities the Idaho State Library and Idaho Library Association could carry out to assist trustees (20 min.)

Wrap up and next steps (10 min.)

Trustee Focus Group Evaluation Form

1. What was your overall impression of the session?

2. Did you feel adequately prepared for the session?
   If no, please explain.

3. Did you have adequate time to express your opinions?
   If no, please explain.

4. If the session were done again, how would you like to see it changed?

5. Please share any other comments you didn't make at the session (please use the reverse if you need more space).

6. If you would like Gail to call you to talk more about your feelings, please add your name, phone number and best time to call.

Name:
Telephone:
Best time to call:

Phone Calls - Trustees

Phone Call List

Maxine Immers	Grangeville
Margetta Foster	Latah County
Carol Stillman	Lewis County
Joanne McCormack	Lewiston
Nancy Maki	Pierce
Doris Lyman	Portneuf District

1. Perceptions of library services:

be there for pleasure readers, information source and for kids to supplement school

pleasure reading, current information, automation, summer reading, space for genealogical society to meet, downtown business collection

information for community needs

recreational reading

2. Reasons/values for being trustees

I enjoy reading, was a school teacher, now retired, like to work at the library, enjoy being there and would be a librarian if I did it again

I had been working on graduate degree in library science, knew library director, was encouraged, has sense of satisfaction, library doing best it can, see growth

I want to see library programs continue for my own use and the community

3. Definition of their roles and responsibilities as trustees

assist librarians with running of the library

make necessary decisions

contribute to the community

knowledgeable about library service

give time to attend meetings, conferences and workshops

budgeting

insurance

legal responsibility

people's rights as readers and patrons

4. Assistance desired in carrying out their roles and responsibilities

censorship

weeding

basic orientation

automation pro's and con's

guidelines for recruiting new trustees

how to work with other libraries

see how other libraries do things
how to go into a bond issue, present plan successfully to sell the community
how to do fundraising
hiring a director
general guidelines for a governing Board (policy, budget, fundraising)
information for people considering becoming a trustee- what it entails
make sure trustees know difference in policy-making vs. running library
broader view of library world

5. Barriers encountered in performing their roles and responsibilities
hiring new librarian, educational requirements
how to make sure policies are carried out with getting into staff roles
relationship of Board with library staff - how to make it good
budgeting
how to be supportive to library director - not overbearing
what is my civic responsibility - to go to Boise and spend x amount or stay home and save money for the library - how to measure value

6. Specific continuing education activities
videotapes
information on who to call if we have questions
print material on topics of interest
regional c.e. events
column for trustees in State Library newsletter
workshops no more than 100 miles away for no longer than one day
area workshops rather than statewide
evening meetings at our library
800 number telephone facilities
book selection for librarians
simplified fact sheets

Phone Calls - Librarians

Phone Call List

Fay Parrott	Buhl
Lucy Perrine	Gooding
Linda Ruthruff	Grangeville
Paul Holland	Idaho Falls
Lynn Baird	Idaho Library Association
Lori Keenan	Moscow-Latah County
Cheryl Reeser	Madison County
Linda Lange	Pierce
Cheryll Breidt	Pinehurst-Kingston
Heidi Riddoch	Shelley
Arlan Call	Twin Falls

1. Topics to help trustees in carrying out their roles and responsibilities

legal issues - trustee responsibility
budgeting
weeding - understanding of purpose
new trustee orientation
understanding the handbook/guidelines for trustees
putting written policies together
where money comes from, especially at the state level
how money filters to local library
comprehensive understanding of legal implications of library law
role of trustee vs. role of library director
how to conduct business efficiently and smoothly
what the State Library can do for trustees
censorship
literacy
daily workings of a library

2. Specific Ideas to help trustees in carrying out their roles and responsibilities

have State Library staff visit on a regular schedule
videotapes on a variety of topics
trustee newsletter
fact sheets on a variety of topics
hold c.e. events closer to library
shorten travel time to attend events
provide session for librarians on how to work with trustees
have events with both library staff and trustees involved
things to get them excited about what libraries do
hold a WILL conference

do events less often and spread them out over time
in-depth one day workshops maximum of 80 miles away

3. Other comments

summer institute helped to see trustees had more authority than I or they knew
have trouble separating items of interest from State Library newsletter
State Library consultant visit from Karen very helpful
got good help from State Library in planning building expansion
easier to stimulate trustees around a project
would like inoculation from outsiders from time to time to share information
would like to hear about State Library directions more often
March is a good month for meetings
would like cluster meetings of Buhl, Jerome, Kimberly areas
Frank helped us get started on WLN
workshops I attended have been useful
Marj has been helpful on specific issues
like Gard and other consulting help State Library provides
trustees work, weekdays hard for them to take off
trustee division weakest link in ILA
library director is key person to educate trustees at Board meetings
I appreciate the State Library doing this